

Appendix A:

14.512 Community Development Work-Study Program

FEDERAL AGENCY:

POLICY DEVELOPMENT AND RESEARCH, DEPARTMENT OF
HOUSING AND URBAN DEVELOPMENT

AUTHORIZATION:

Housing and Community Development Act of 1987, Section 501(b)(2),
Public Law 100-242; Housing and Community Development Act of 1974,
Section 107, as amended.

OBJECTIVES:

Under the Community Development Work-Study Program(CDWSP), HUD will make grants to institutions of higher education, either directly or through areawide planning organizations or States, for the purpose of providing assistance to economically disadvantaged and minority students who participate in community development work-study programs and are enrolled in full-time graduate programs in community and economic development, community planning or community management. The primary objectives of the program are to attract economically disadvantaged and minority students to careers in community and economic development, community planning, and community management, and to provide a cadre of well qualified professionals to plan, implement, and administer local community development programs.

TYPES OF ASSISTANCE:

Project Grants.

USES AND USE RESTRICTIONS:

Institutions of higher education, areawide planning organizations or States may apply for grants to assist economically disadvantaged and minority students who participate in CDWSP's and are enrolled in full-time graduate programs in community and economic development, community planning or community management, or other related fields of study. Related fields include public administration, urban management, urban planning, and exclude social and humanistic fields such as law, economics (except urban economics), social work, psychology, education and history.

ELIGIBILITY REQUIREMENTS:

Applicant Eligibility: Institutions of higher education offering graduate degrees in a community development academic program are eligible. An areawide planning organization (APO) or a State may apply for assistance for a program that will be conducted by two or more institutions of higher education. Institutions of higher education participating in an APO program must be located within the metropolitan or non-metropolitan area served by the APO. Institutions of higher

education participating in a State program must be located within the State.

Beneficiary Eligibility: The principal beneficiaries of the Community Development Work-Study Program are economically disadvantaged students who seek careers in community and economic development, community planning, community management or other related fields of study.

APPLICATION AND AWARD PROCESS:

Preapplication Coordination: Applicants will have to respond to a HUD Notice of Funding Availability (NOFA) which will be published yearly in the Federal Register. This program is excluded from coverage under Executive Order 12372 and OMB Circular No. A-102.

Application Procedure: Not applicable. This program is excluded from coverage under OMB Circular No. A-110.

Award Procedure: Applicants who respond to the yearly NOFA and compete successfully by being selected by the review panel will be awarded a grant. HUD will usually make an award within forty to fifty five (40-55) days of the closing date of the RFGA.

Deadlines: Competition. Determined by NOFA date published in the Federal Register.

Range of Approval/Disapproval Time: Generally within 40 to 55 days.

Appeals: None.

Renewals: Applications will have to be submitted on a yearly basis for a two (2) year funding cycle in response to a Notice of Funding Availability.

ASSISTANCE CONSIDERATIONS:

Formula and Matching Requirements: None.

Length and Time Phasing of Assistance: Assistance is for an annual two year program funding cycle (August-July).

POST ASSISTANCE REQUIREMENTS:

Reports: Semi-annual and final reports.

Audits: In accordance with the provisions of OMB Circular No. A-133 (Revised, June 24, 1997), "Audits of States, Local Governments, and Non-Profit Organizations," nonfederal entities that receive financial assistance of \$300,000 or more in Federal awards will have a single or a program-specific audit conducted for that year. Nonfederal entities that expend less than \$300,000 a

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year in Federal awards are exempt from Federal audit requirements for that year, except as noted in Circular No. A-133.

Records: The applicant must maintain records with regard to management and work plans including schedules for major activities, student monitoring procedures, and the assignment of staff to the program. Also the applicant must submit information describing the student's racial, ethnic and income characteristics; the student's academic, placement and employment status; and the amount of assistance provided to the student. Such information must be submitted upon completion of each academic school term for the institution until all assisted students have completed their participation in the CDWSP.

FINANCIAL INFORMATION:

Account Identification: 86-0162-0-1-451.

Obligations: (Grants) FY 99 \$3,517,213; FY 00 est \$3,000,000; and FY 01 est \$3,000,000. (NOTE: Amounts reported reflect allocation of new budget authority rather than obligation amounts.)

Range and Average of Financial Assistance: Applicants generally receive funding to assist four students, with an average grant per student of \$30,000.

PROGAM ACCOMPLISHMENTS:

Approximately 150 students are assisted each year in obtaining their masters degrees in a community building field.

REGULATIONS, GUIDELINES, AND LITERATURE:

24 CFR 570.415.

INFORMATION CONTACTS:

Regional or Local Office: None.

Headquarters Office: For application kits, contact HUD USER, P.O. Box 6091, Rockville, MD 20849. Telephone: 1-800-245-2691. Direct technical questions to Jane Karadbil, Office of University Partnerships, Department of Housing and Urban Development, Room 8110, 451 7th Street, SW., Washington, DC 20410. Telephone: (202) 708-1537, extension 5918.

RELATED PROGRAMS:

14.513, Hispanic-Serving Institutions Work-Study Program.

EXAMPLES OF FUNDED PROJECTS:

Not applicable.

CRITERIA FOR SELECTING PROPOSALS:

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Competitive process. Criteria will be published in the Notice of Funding Availability.

FOR RELEASE

Appendix B: Detailed Description of Phases

The following table describes each phase of the process along with the activities and positions that are involved in its successful completion.

Phase	Position Involved	Descriptions/Activities
Pre-Application Phase	Application Manager	Set new Initiative objectives, funding, and timeline; Publish new Initiative to web; Clarify applicants' questions about Initiative characteristics
Pre-Application Phase	Applicant	Search for Initiative; Download necessary forms, Set estimated funding requirements, Publish Initiative/Application questions to web; Send in Application
Application Intake Phase	Application Manager	Receive applications; monitor applications for errors, missing info, appropriate signature; create entry for the application, organization, contact; prepare for assessment
Review Phase	Review Manager	Coordinate application distribution to Reviewers; monitor returns; conduct final evaluations of applications; provide results to Grants Mgr and discuss applications under negotiation
Review Phase	Reviewer	Receive applications from Reviewer Mgr; conduct assessment; create notes, activities, and attachments for application; return application with all descriptions and score
Award Phase	Grants Manager	Final decision on negotiated applications, funds allocated, and level of support set;
Administration	Grants Manager	Coordinate obligation of funds; maintain agreement guidelines; monitor program results, completion of milestones, and scheduling effectiveness; give Approvals for transactions
Administration - Financial	Financial Manager	Document financial transactions; authorize payment requests; monitor obligation, accruals, and amt. paid to grantee; maintain account history

Appendix C: Financial Manager (Financial Management)

Screens	Views
Initiatives	Initiative Finance
Applications	Attachments; Activities; Notes; Finance Summary; Accounting History; Payments; Payment Requests; Accrual; Closed Agreements

Appendix D: Database (Grant Organization)

A database includes organizations that are repeat clients or first time grant applicants with the granting entity. The fields identity key contact information, relationship with other organizations, and application history of each organization.

Field Name	Type	Use	Custom	Notes
Annual Revenue	Number	Grantee annual revenue	Yes	
Date Formed	Date	Date entered into system	No	
Employees	Number	Number of employees at Organization	No	
Row Status	BOOL	Flag designates a new entry	No	
Name	AlphaNum	Name of Grant Organization	No	
Location	AlphaNum	Address	No	
Main Phone Number	Number	Phone #		
Main Fax Number	Number	Fax #		
Home Page	AlphaNum	URL	No	
Type	AlphaNum	Account Type	No	LOV Table
Sales Rep	AlphaNum	Account Team with one or more members	No	
Account Status	AlphaNum	Status	No	LOV Table
Parent Account Name	AlphaNum	Identifies Relationship between Accounts	No	
Parent Account Location	AlphaNum	Address for Parent Account	No	
Assignment Area Code	Number	Area Code for Assignment	No	
Assignment Country Code	Number	Country Code for Assignment	No	
DUNS Number	Number	DUNS Number	NO	

Appendix E: Reviewer (Assessments)

Screens	Views
Initiatives	All Initiatives; Overview; Attachments
Applications	Attachments; Activities; Assessments; Notes

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Appendix F: Review Manager (Review Management)

Screens	Views
Initiatives	All Initiatives; Overview; Attachments
Applications	Completed Applications; Attachments; Activities; Assessments; Notes

Appendix G: Grants Manager (Grants Management)

Screens	Views
Initiatives	All Initiatives; Mailing List; Attachments; Applications; Initiative Finance
Applications	All Applications; Completed Applications; Attachments; Activities; Assessments; Notes; Application Finance
Grant Organizations	All Grant Organizations

Appendix H: Literature Screen

The Literature screen maintains a list of reproducible documents that can be sent to contacts, granting agencies, and applicants.

View	Use	Applets	Custom
Literature	Lists all available pieces of literature	Sales Tools List Applet; Sales Tool Entry Applet	No
Product Literature	Easy navigation through product literature	Literature Tree Applet; Product Line Applet	No

Appendix I: Overview

Below is detailed description of the key positions and the associated responsibilities within the MGMS. Some positions only have one responsibility, but as the solution grows with further functionality, new positions will be added and established positions will gain responsibilities.

Position (Y) vs. Responsibilities (X)

	Grants Management	Financial Management	Review Management	Reviews	Application Intake	Ongo Supp Mana
SADMIN	X	X	X	X	X	X
Grants Manager	X	X	X			
Financial Manager		X				
Review Manager			X	X		
Reviewer				X		
Application Manager					X	X
Ongoing Support Manager						X

Appendix J: Grants Applications Screen

The grants applications screen is a module designed to allow the applicant to navigate through a list of all published grants initiatives that are currently soliciting applications for award. The applicant can then apply online by choosing the Initiative and filling out the necessary forms online. The applicant can then periodically check on the status of their application by accessing the system and finding their most recent application.

Views	Applets	Use
Log Intent To Apply	Custom HTML	Table for choosing Initiative and naming Grant Organization
Online Application	Opportunity List Applet	Search Spec, only displays current online application
Available Initiatives	Custom HTML: Available Initiatives; Selected Initiatives	Lists All Available Initiatives for application (Published Initiatives)
View Application Status	Opportunity List Applet	All Applications for Grant Organization
Application Detail View	Opportunity Form Applet; Opportunity Attachment Applet	Drilldown from Opportunity List Applet; provides further detail of application

Appendix K: Grant Initiatives Screen

The Grant Initiatives screen presents the User a list of all published Initiatives, along with summaries and attachments. The User can also conduct a search for a specific Initiative by topic area.

Views	Applets	Use
Current Grant Initiatives	Web Campaign List	All Initiatives published to web
Initiative Summaries	AMS Grants - Campaign Summary; Campaign Attachment Applet	Initiative descriptions and attachments to provide further info.
Grant Initiatives Search	Custom HTML	Search Table with list of Products
Grant Initiative Search Results	Web Campaign List	Returns results from inquiry

Appendix L: Grant Organization Screen

View	Use	Applets	Custom
My Accounts	Accounts owned by User	Account List Applet; Account Entry Applet	No
My Team's Accounts	Teams Accounts	Account List Applet; Account Entry Applet	No
All Grant Organizations	Grant Organizations	Account List Applet; Account Entry Applet	No
Grants	Grant history for account	Account Form Applet; Grants List Applet	Yes
Activities	Activities for account	Account Form Applet; Account Activity List Applet	No
Activity Plans	Schedules activities and action plan for account	Account Form Applet; Activity Plan List Applet; Activity Plan Action Applet	No
Agreements	Agreements with organization	Account CSN Detail Applet NB; Agreement List Applet	No
Attachments	Holds attachments for specific account	Account Form Applet; Account Attachment Applet	No
Contacts	Representatives for organization.	Account Form Applet; Account Contact List Applet	No
Entitlements	Extent of relationship for account	Account CSN Detail Applet NB; Account Entitlement List Applet	No
Explorer	N/A	Account Tree Applet ; Account List Applet	No
Notes	Ability to attach notes to applications	Account Form Applet ; Account Note Applet; Account Private Note Applet	No
Projects	Related projects	Account Form Applet; Account Project List Applet	No
Service Agreements	N/A	Account CSN Detail Applet NB; Account Service Agreement List Applet	No
Service Explorer	N/A	Account Tree Applet ; Account List Applet	No

Service Profile	Service overview	Account CSN Detail Applet NB; Asst Mgt- Asset List Applet; Service Account Profile Applet; Service Account Contact list Applet	No
Inquiries	Service Requests by organization	Account CSN Detail Applet NB; Account Service Request List Applet	No

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Appendix M: Grant Initiative Opportunity

A grant initiative application is submitted to a granting agency for review and possible award. Its fields identify the applying entity, the application status, and summary financial information.

Field Mapping

Field Name	Type	Use	Custom	Notes
Opportunity Revenue Class	AlphaNum	Stage	No	
Created	Date	Records Date that application was completed by grantee	No	
Close Date	Date	Date Received by Agency	No	Close Date => Created
DateStateReceived	Date	Date when received by state agency	Yes	Field for federal compliance purposes.
Account	AlphaNum	Grantee organization Name	No	
Account Location	AlphaNum	Address	No	
Account Fiscal Year End	Date		Yes	
ApplicantType	AlphaNum	Applicant Description from Form 424	Yes	Form 424 is Application for Fed. Assistance
Application Type	AlphaNum	Application Description	Yes	Form 424 Field
AreasAffected	AlphaNum	Names of cities, counties, states	Yes	Form 424 Field
CfdaNumber	Number	Catalog of Federal Domestic Assistance Numbers	Yes	Form 424 Field

CongDistApp	AlphaNum	Applicant's Congressional District	Yes	
CongDistProj	AlphaNum	Project's Congressional District	Yes	
Contact Rep First Name	AlphaNum	Contact First Name	No	Contact Rep =/ Authorized Contact
Contact Rep Id	Number	Id Number	No	
Contact Rep Last Name	AlphaNum	Contact Last Name	No	
Contact Rep Name	AlphaNum	Contact Rep for account	No	Contact Rep may (not) = Authorized Contact or Key Contact
DelinquentDebt	BOOL	Delinquent on Fed. Debt Notice	Yes	Form 424 Field
EIN	Number	Employer Identification Number	Yes	
ExemptType1237 2	Date	Executive Order 12372 Status	Yes	If application is subject to review by E.O. 12372
Grants - Accounting Template	AlphaNum	Momentum Accounting Template	Yes	LOV Table
Grants - Accrued Amount	Number	Current Accrued Amount	Yes	
Grants - Application Score	Number	Assessment score	Yes	In Review phase
Grants - Approved by FM Datetime	Date	Date/time stamp of Financial Manager's Approval of	Yes	
Grants - Approved by FM Flag	BOOL	Flag indicating that the obligation has been approved by Financial Manager	Yes	

Grants - Approved by FM Login	AlphaNum	Login ID for FM	Yes	
Grants - Approved by GM Datetime	Date	Date/time stamp of Grants Manager's Approval of Obligation	Yes	
Grants - Approved by GM Flag	BOOL	Flag indicating that the obligation has been approved by GM	Yes	
Grants - Approved by GM Login	AlphaNum	Login ID for Grants Manager	Yes	
Grants - Approved Amount	Number	Current Obligation Amount	Yes	
Grants - Assessment Number	Number	Number of completed reviews	Yes	
Grants - Commitment Approved by GM Datetime	Date	Date/time stamp of Grants Manager's Approval of Commitment	Yes	
Grants - Commitment Approved by GM Flag	BOOL	Flag indicating that the commitment has been approved by GM	Yes	
Grants - Commitment Approved by GM Login	AlphaNum	Login ID for Grants Manager	Yes	
Grants - Commitment Number	Number	Momentum Doc # Commitment	Yes	
Grants - Last Accrual Number	Number	Counter for the total number of accruals	Yes	
Grants - Last Mod	Number	Last amendment # for this application's obligation	Yes	
Grants - Last Payment Number	Number	Counter for the total number of payments	Yes	

Grants - Obligation Number	Number	Momentum Doc #	Yes	
Grants - Paid Amount	Number	Total amount paid against this application's obligation	Yes	Updated to Momentum
Grants - Review List	Number	List of all reviewers who have provided an assessment	Yes	
Key Contact Id	Number	Contact Id	No	Main Contact at Organization
Key Contact Name	AlphaNum	Contact Name	No	
Opportunity Sales Status	AlphaNum	LOV	No	LOV
Planned End	Date	Application Intake end date for Agency	No	
Planned Start	Date	Application Intake start date for Agency	No	
Product	AlphaNum	Product Category	No	
ReviewDate12372	Date	Date of Application Review under E.O. 12372	Yes	Form 424 Field
RevisionReason	AlphaNum	Grant Revision field on Form 424	Yes	
Signature	AlphaNum	Digital Signature of Authorized Contact	Yes	
SignatureDate	Date	Date Application was signed	Yes	
StateApplicationID	Number	State Identifier Number tracking Application	Yes	Form 424
Strength	AlphaNum	Verbal description of application	No	

Submission Type	AlphaNum	Submission description of Application	Yes	LOV
Total Cost	Number	Total Cost of Proposed Program	Yes	
GrantsAgencyClosedDate	Date	Agreement Closed Date by Agency	Yes	
GrantsAgencyClosedFlag	BOOL	Flag indicates that the Agreement is closed by Agency	Yes	
grantsGranteeClosedDateTime	Date	Agreement Closed Date by Grantee	Yes	
grantsGranteeClosedFlag	BOOL	Flag indicates that the Agreement is closed by Grantee	Yes	
grantsTotalIncomeAmount	Number	Total Program Income	Yes	
Description	AlphaNum	Extended application description/Title	No	
Sales Rep	AlphaNum	Sales Team Member	No	Only one primary, along with one or many team members
Campaign	AlphaNum	Name of Initiative	No	
Source Type	AlphaNum	Channel of response from applicants	No	
Row ID	Number	Application ID is the unique tracking # generated when created	No	
FedApplication Id	Number	Federal Identifier	Yes	
StateApplication Id	Number	State Application Identifier	Yes	

EstAppFunding	Number	Estimated Application Funding filled out on Form 424 by applicant	Yes	
EstFedFunding	Number	Estimated Federal Funding filled out on Form 424 by applicant	Yes	
EstStateFundin g	Number	Estimated State Funding filled out on Form 424 by applicant	Yes	
EstLocalFundin g	Number	Estimated Local Funding filled out on Form 424 by applicant	Yes	
EstOtherFundin g	Number	Estimated Other Funding filled out on Form 424 by applicant	Yes	
EstProgramInco me	Number	Estimated Program Income filled out on Form 424 by applicant	Yes	
Revenue	Number	Estimated Total Funding filled out on Form 424 by applicant	No	
Authorized Rep Id	Number	Login for Authorized Rep	Yes	Contact with Org. Authorizati on
Authorized Rep Last Name	AlphaNum	Contact Last Name	Yes	
Authorized Rep First Name	AlphaNum	Contact First Name	Yes	
Authorized Rep Title	AlphaNum	Contact Title	Yes	
Authorized Rep Phone	Number	Contact Phone #	Yes	

Appendix N: Contact

A contact identifies representatives for grant soliciting organizations. Various types of contacts exist – including, key contact rep, authorized rep, and other contact, each have fields listing position, address and phone information, and activities associated with that contact.

Field Name	Type	Use	Custom	Notes
Applicant Type	AlphaNum	Describes Applicant	Yes	
Approval Authority	BOOL	Designates Authorized Contact	Yes	
CongDistApp	AlphaNum	Applicant's Congressional District	Yes	
EIN	Number	Employer Identification Number	Yes	
Last Name	AlphaNum	Last Name	No	
Row Status	BOOL	Flag designates a new entry	No	New Designation
First Name	AlphaNum	Contact First Name	No	
M/M	AlphaNum	Mr/Ms.	No	
Work Phone #	Number	Work Phone #	No	
Fax #	Number	Work Fax	No	
Home Phone #	Number	Home Phone	No	
Job Title	AlphaNum	Job Title	No	LOV
Email Address	AlphaNum	Email Address	No	
Receive Email Updates	BOOL	Receive Email Update	No	Flag
Account	AlphaNum	Organization Affiliation	No	
Account Location	AlphaNum	Organization Address	No	
Street Address	AlphaNum	Address	No	
City	AlphaNum	City	No	
State	AlphaNum	State	No	
Postal Code	Number	Zip	No	

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Sales Rep	AlphaNum	Access List	No	Team members with access to information
Authorized Rep Id	Number	Designates an authorized contact	Yes	

Appendix O: Program Administrator or Application Manager (Application Management)

Screens	Views
Initiatives	All Initiatives; Overview; Attachments
Applications	All Applications, Attachments; Activities; Notes; Contacts
Grant Organizations	All Grant Organizations, Grants, Contact

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Appendix P: Inquiries Screen

The Inquiries Screen is the application's FAQs tool for applicants, such as logging applicant's concerns, making updates, and publishing results as solutions.

View	Use	Applets	Custom
All Inquiries	Service requests	Service Request List Applet; Service Request Detail Applet	No
Activity Plans	Activity management views	Service Request Detail Applet NB ; FS Template Activity Plan List Applet; FS Template Activity Action Plan List Applet	No
Acitivity	Activities concerning inquiries	Service Request Applet NB; Service Request Activity List Applet	No
Attachments	Attachments concerning inquiries	Service Request Detail Applet NB; Service Request Attachment List Applet	No
Customer Satisfaction Survey	Log customer satisfaction response	Customer Satisfaction Survey Applet; Customer Satisfaction Chart Applet	No
Field Service Details	Inquiry overview with field service descriptions	Service Request List Applet; Service Request Detail Applet NB; FS Service Request Detail Applet	No
Metrics	Metrics for inquiries	Service Request Detail Applet NB; Service Request Metrics Applet	No
Product Defects	Product defects lists	Service Request Detail Applet NB; Product Defects Applet	No
RMA's/ Service Orders	Orders concerning inquiries	Service Request Detail Applet NB; Order Entry - Order List Applet	No
Service Calendar	Calendar for inquiries	Service Request Detail Applet for Srv Agreement; Service Calendar	No
Solution Search	Solution Search	SR Detail Applet w/ Toggle; SR Solution Detail	No

Appendix Q: Grant Reference Screen

Grant Reference enables the User to search a database of FAQs that have been logged and published on the connected client module.

Views	Applets	Use
Query For FAQ	ISS Solution List Applet	List published FAQs
FAQ Detail	FAQ Detail Applet	Drilldown on FAQ in List Applet brings description of question and solution.
View Literature		View any literature attached

Appendix R: Customer Service Screen

The customer can access their profile view and make updates to most fields. In the Customer Service screen, the user can submit a question concerning their account, the grants process, or a published initiative. In order to ensure client satisfaction, the Status of FAQ view is constantly updated to allow the client to track their question and its resolution.

Views	Applets	Use
My Profile	My Profile	Up date client profile
Submit a Question	Custom HTML	Enter question for review
Status of FAQ	ISS Service Request Activity List Applet	Updates status of resolution

	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046	2047	2048	2049	2050	2051	2052	2053	2054	2055	2056	2057	2058	2059	2060	2061	2062	2063	2064	2065	2066	2067	2068	2069	2070	2071	2072	2073	2074	2075	2076	2077	2078	2079	2080	2081	2082	2083	2084	2085	2086	2087	2088	2089	2090	2091	2092	2093	2094	2095	2096	2097	2098	2099	2100	2101	2102	2103	2104	2105	2106	2107	2108	2109	2110	2111	2112	2113	2114	2115	2116	2117	2118	2119	2120	2121	2122	2123	2124	2125	2126	2127	2128	2129	2130	2131	2132	2133	2134	2135	2136	2137	2138	2139	2140	2141	2142	2143	2144	2145	2146	2147	2148	2149	2150	2151	2152	2153	2154	2155	2156	2157	2158	2159	2160	2161	2162	2163	2164	2165	2166	2167	2168	2169	2170	2171	2172	2173	2174	2175	2176	2177	2178	2179	2180	2181	2182	2183	2184	2185	2186	2187	2188	2189	2190	2191	2192	2193	2194	2195	2196	2197	2198	2199	2200	2201	2202	2203	2204	2205	2206	2207	2208	2209	2210	2211	2212	2213	2214	2215	2216	2217	2218	2219	2220	2221	2222	2223	2224	2225	2226	2227	2228	2229	2230	2231	2232	2233	2234	2235	2236	2237	2238	2239	2240	2241	2242	2243	2244	2245	2246	2247	2248	2249	2250	2251	2252	2253	2254	2255	2256	2257	2258	2259	2260	2261	2262	2263	2264	2265	2266	2267	2268	2269	2270	2271	2272	2273	2274	2275	2276	2277	2278	2279	2280	2281	2282	2283	2284	2285	2286	2287	2288	2289	2290	2291	2292	2293	2294	2295	2296	2297	2298	2299	2300	2301	2302	2303	2304	2305	2306	2307	2308	2309	2310	2311	2312	2313	2314	2315	2316	2317	2318	2319	2320	2321	2322	2323	2324	2325	2326	2327	2328	2329	2330	2331	2332	2333	2334	2335	2336	2337	2338	2339	2340	2341	2342	2343	2344	2345	2346	2347	2348	2349	2350	2351	2352	2353	2354	2355	2356	2357	2358	2359	2360	2361	2362	2363	2364	2365	2366	2367	2368	2369	2370	2371	2372	2373	2374	2375	2376	2377	2378	2379	2380	2381	2382	2383	2384	2385	2386	2387	2388	2389	2390	2391	2392	2393	2394	2395	2396	2397	2398	2399	2400	2401	2402	2403	2404	2405	2406	2407	2408	2409	2410	2411	2412	2413	2414	2415	2416	2417	2418	2419	2420	2421	2422	2
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View	Use	Applets	Custom
All Solutions	Lists all solutions	Solution List Applet; Solution Form Applet	No
Resolution Documents	Documents describing solutions	Solution Applet w/ NB; SR Resolution Item List Frame No Delete	No

Appendix T: Grant Initiatives Publication

Field Mapping

Field Name	Type	Use	Custom	Notes
Agency	AlphaNum	Agency Sponsoring grant	Yes	
Grants - Accrued Amount	Number	Amt accrued by grantees under this initiative	Yes	
Grants - Applications Awarded	AlphaNum	Tracks awarded applications to this initiative	Yes	
Grants - Applications Received	Number	All applications received	Yes	
Grants - Obligated Amount	Number	Amt obligated to grantees under this initiative	Yes	
Grants - Paid Amount	Number	Amt paid to grantees under this initiative	Yes	
Group Position Id	Number	Identifier	Yes	
Name	AlphaNum	Initiative	No	
Parent Initiative	AlphaNum	Identifies relationship between various campaigns.	No	
Purpose	AlphaNum	Purpose of Initiative	No	
Objective	AlphaNum	Objective of Initiative	No	
Response Type	AlphaNum	Response Type	No	
Position	AlphaNum	Campaign Team has one or more members	No	
Period	AlphaNum	Period for Grant	No	
Start Date	Date	Start Date for Grant	No	Beginning Date
End Date	Date	End Date	No	

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Language Name	AlphaNum	Language	No	
Total Cost	Number	Est. budget for grant program	No	
Grants - CFDA Number	Number	CFDA Number	Yes	Form 424
Application End	Date	Application End date for submission	Yes	
Application Start	Date	Application Start date for submission	Yes	Start date for submission
Publish	BOOL	Publish Initiative information on eService	Yes	Publish Initiative information on eService
Agency	AlphaNum	Agency Name sponsoring grant	Yes	

Appendix U: Initiative Screen

The Initiative screen is configured to handle the pre-application process of grants management. With functionality to create an initiative, publish it to the web, and track the applications.

View	Use	Applets	Custom
All Initiatives	Lists all published and unpublished initiatives.	Campaign List Applet; Campaign Description Applet - 2 Sectors; Campaign Summary Applet	No
Activities	Shows all activities unique to a particular initiative.	Campaign Description Applet - 2 Sectors; Activity List Applet	No
Mailing List	Mailing list for all potential applicants. List of contacts and prospects.	Campaign Description Applet - 2 Sectors; Campaign Prospect Applet; Campaign Contact/Prospect Applet	No
Explorer	List of all initiatives with explorer capabilities.	Campaign Tree Applet; Campaign List Applet	No
Literature	Ability to attach literature to initiative.	Campaign Description Applet - 2 Sectors; Sales Tool List Applet	No
Overview	Overview of initiative.	Campaign Description Applet; Campaign Summary Applet; Campaign Prospect Applet; Campaign Tool Applet; Initiative Service Request List Applet	No
Summary	Written summary of initiative.	Campaign Description Applet - 2 Sectors; Campaign Summary Applet	No
Attachments	To send documents in reference to initiative.	Campaign Description Applet - 2 Sectors; Campaign Attachment Applet	No
Applications	Lists all applications for particular initiative.	Campaign Description Applet - 2 Sectors; Opportunity List Applet	No

Initiative Overview	Summary and attachment views provide clear overview.	AMS Grants - Campaign Summary; Campaign Attachment Applet	No
Initiative Finance	Initiative funding and open application info	Campaign Finance List Applet	No

Appendix V: Applications Screen

The Application Screen handles the application intake, the application review, and grant award processes.

View	Use	Applets	Custom
All Applications	Lists all applications received.	Opportunity List Applet; Opportunity Entry Applet	No
Completed Applications	Lists all applications that are 'Closed' or 'Pending Close'	AMS Grants - Opportunity Review List Applet	No
Attachments	Attachments returned with applications	Opportunity Form Applet; Opportunity Attachment Applet	No
Activities	Activities surrounding applications	Opportunity Form Applet; Opportunity Activity Applet	No
Assessments	Application review process	Opportunity Form Applet; Sales Assessment List Applet (opty); Sales Assessment Value List Applet	No
Notes	Ability to attach notes to applications	Opportunity Form Applet; Opportunity Note Applet; Opportunity Private Note Applet	No
Finance Summary	Summary of awards, obligation, and accruals	AMS Grants - Finance Summary	Yes
Application Finance	Views designed to interact with Momentum.	AMS Grants - Opportunity List Applet	Yes
Accounting History	Transaction history	AMS Grants - Opportunity Form Applet; AMS Grants - Accounting History List Applet	Yes
Payments	Manages payment request from grant holders	AMS Grants - Opportunity Form Applet; AMS Grants - Payment List Applet	Yes
Payment Requests	Payment withdrawal applets	AMS Grants - Payment Request Applet; AMS Grants - Payment Form Applet	Yes

Accruals	Accruals updates	AMS Grants - Opportunity Form Applet; AMS Grants - Accrual List Applet	Yes
Contacts	Lists contacts and attachments associated with application	Opportunity Form Applet; Opportunity Contact List Applet; Opportunity Attachment Applet	No
Closed Agreements	Lists applications that are 'Closed' or 'Pending Close'	Closed Agreement List Applet; Opportunity Entry Applet	Yes

Appendix W: Activities Screen

The Activities Screen administers the ownership and status of all activities logged into application. Activities are assigned based on ownership, skill, or availability to the appropriate employee.

Screen Breakdown: Activities

View	Use	Applets	Custom
My Activities	Activities where User is owner	Activity List with Navigation; Activity Option Applet	No
My Delegated Activities	Activities delegated by User	Delegated Activity List Applet; Activity Option Applet	No
My Team's Activities	Activities for User's team	Activity List with Navigation; Activity Option Applet	No
Other Activities	Other activities	Activity List with Navigation See Other; Activity Option Applet See Other	No
All Activities	All activities logged in application	Activity List with Navigation; Activity Option Applet	No
My To Do List	Personal To Do List	Activity To Do List Applet	No
My Email Activities	Personal email activities	Activity List Email; Activity Email Option Applet	No

Appendix X: Grant Agreements

This screen is central to the administration of Grant Agreements. The User sees the Agreements List Applet that has all the agreements for their Grant Organization. By drilling-down on the agreement, the Agreement Detail View illustrates the activities, attachments, and payments associated with the agreement. The User is capable of updating and modifying current settings for these fields, and sending them for approval.

Views	Applets	Use
View Agreements	Agreements List Applet	Lists All Agreements between grantee and granting Agency
Agreement Detail	Agreement Detail Form Applet; Agreement Activities Applet; Agreement Attachment Detail Applet; AMS - Payment List Applet	Drilldown view from Agreements List Applet
Application Detail	Agreement Detail Entry Applet	Drilldown for "Update Agreement". Changes data.
Update Activity	Activity Entry Applet	Drilldown for "Update Activities" Changes data.
Update Attachments	Attachment Entry Applet	Add an Attachment
Update Payments	Agreement Payment Request	Make a new payment request

Appendix Z: Accrual

Accrual administers accrual activities within the grants financial modules. Financial managers have access to all accrual activities. Fields are mapped to corresponding fields within the financial management system, such as Momentum.

Field Name	Type	Use	Custom	Notes
Document Date	Date	Momentum Document Date	Yes	
Document Type	AlphaNum	Momentum Document Type	Yes	
Document Number	Number	Momentum Document Number	Yes	
Document Status	AlphaNum	Status of request	Yes	
Document Amount	Number	Amt obligated	Yes	
FM Approval Flag	BOOL	Flag indicating that the accrual has been approved by FM	Yes	
FM Approval Login	AlphaNum	Login ID for Financial Manager	Yes	
FM Approval Datetime	Date	Date/time stamp of Financial Manager's Approval of Accrual	Yes	
Name	AlphaNum		No	
Parent Row Id	Number		No	Siebel Fields
Row Id	Number		No	Siebel Fields
Category	AlphaNum		No	Siebel Fields

Appendix AA: Agreement Income

The Agreement income business component tracks program income and interest. It is also used for integration with Momentum.

Field Name	Type	Use	Custom	Notes
Accounting Template	AlphaNum	Momentum Accounting Template	Yes	AMS Grants Accounting Template Picklist
Deposit Number	Number	Momentum Deposit Number	Yes	
Document Status	AlphaNum	Document Status	Yes	
FM Approval Datetime	Date	Date/time stamp of Financial Manager's Approval of Program Income	Yes	
FM Approval Flag	BOOL	Flag indicating that the Prog. Income has been approved by FM	Yes	
FM Approval Login	AlphaNum	Login ID for FM	Yes	
Income Amount	Number	Program Income Amount	Yes	
Income Type	AlphaNum	Interest vs. Income	Yes	AMS Grants Income Type Picklist
Receipt Document Line	AlphaNum	Momentum Receipt Document Line	Yes	
Receipt Document Number	AlphaNum	Momentum Document Number	Yes	
Receipt Document Type	AlphaNum	Momentum Document Type	Yes	
Record Receipt Flag	BOOL	Determines whether the transaction is sent to Momentum	Yes	
Reported Date	Date	Reported Date	Yes	

Appendix AB: Finance Summary Screen

The Finance Summary Screen is a custom screen that tracks all awarded applications, their associated financial transactions, and all payment requests.

View	Use	Applets	Custom
Finance Summary	Total coverage of financial exchanges for awarded applications	AMS Grants - Finance Summary	Yes
Accounting History	Lists all transactions for awarded applications	AMS Grants - Opportunity Form Applet; AMS Grants - Accounting History List Applet	Yes
Payment Requests	Tracks All Payment Requests created for awarded applications	AMS Grants - Payment Request Applet; AMS Grants - Payment Form Applet	Yes

Appendix AC: Grants Acct History

The grants acct history business component tracks financial transactions that result from grant activity including new and corrected commitments, obligations, accruals and payments.

Field Name	Type	Use	Custom	Notes
Category		Category	No	
Name		Name	No	
Parent Row Id		Parent Row Id	No	
Grants FM Approval Date Time	Date	Date/time stamp of Financial Manager's Approval of Transaction	Yes	All fields copied from financial transactions .
Grants FM Approval Flag	BOOL	Flag indicating that the transaction has been approved by FM	Yes	All fields copied from financial transactions .
Grants FM Approval Login	Alpha Num	Login ID for Financial Manager	Yes	All fields copied from financial transactions .
Grants GM Approval Date Time	Date	Date/time stamp of Grant's Manager's Approval of Transaction	Yes	All fields copied from financial transactions .
Grants GM Approval Flag	BOOL	Flag indicating that the transaction has been approved by GM	Yes	All fields copied from financial transactions .
Grants GM Approval Login	Alpha Num	Login ID for Grants Manager	Yes	All fields copied from financial transactions .
Grants Transaction Amount	Number	Transaction Amount	Yes	All fields copied from financial transactions .

[illegible]

Grants Transaction Date	Date	Transaction Date	Yes	All fields copied from financial transactions .
Grants Transaction Effect	Alpha Num	Transaction Effect	Yes	All fields copied from financial transactions .
Grants Transaction Type	Alpha Num	Transaction Type	Yes	All fields copied from financial transactions .

Appendix AD: Initiative Screen

The Initiative screen is configured to handle the pre-application process of grants management. With functionality to create an initiative, publish it to the web, and track the applications, the Initiative screen is the starting point for grants management.

View	Use	Applets	Custom
All Initiatives	Lists all published and unpublished initiatives.	Campaign List Applet; Campaign Description Applet - 2 Sectors; Campaign Summary Applet	No
Activities	Shows all activities unique to a particular initiative.	Campaign Description Applet - 2 Sectors; Activity List Applet	No
Mailing List	Mailing list for all potential applicants. List of contacts and prospects.	Campaign Description Applet - 2 Sectors; Campaign Prospect Applet; Campaign Contact/Prospect Applet	No
Explorer	List of all initiatives with explorer capabilities.	Campaign Tree Applet; Campaign List Applet	No
Literature	Ability to attach literature to initiative.	Campaign Description Applet - 2 Sectors; Sales Tool List Applet	No
Overview	Overview of initiative.	Campaign Description Applet; Campaign Summary Applet; Campaign Prospect Applet; Campaign Tool Applet; Initiative Service Request List Applet	No
Summary	Written summary of initiative.	Campaign Description Applet - 2 Sectors; Campaign Summary Applet	No
Attachments	To send documents in reference to initiative.	Campaign Description Applet - 2 Sectors; Campaign Attachment Applet	No

Appendix AE: Contact Screen

The Contact Screen manages a grant organization's representatives. Contacts are designated by their organizations with responsibilities that effect different parts of the grants process. This allows the User to quickly identify the appropriate contact at a grant organization to contact.

View	Use	Applets	Custom
All Contacts	Documents various roles of contacts at organizations.	Contact List Applet; Contact Entry Applet	No
Activities	Particular to one contact.	Contact Form Applet; Contact Activity Applet	No
Activity Plan	Activity management made easy.	Activity Plan List Applet; Activity Plan Action Applet	No
Agreement	Basis of relationship.	Contact Service Agreement List Applet	No
Assessment	Updated to value contact relationship	Sales Assessment List Applet; Sales Assessment Value List Applet	No
Attachment		Contact Attachment Applet	No
Categories		Contact Category List Applet	No
Entitlements	Terms and extent of relationship	Contact Explicit Entitlement List Applet; Contact Implicit Entitlement List Applet	No
Manager's Explorer	Manager view	Manager's Tree Applet; Contact List without Alphatab Applet	No
Notes	Personal or team notes on contact history	Contact Note Applet; Contact Private Note Applet	No
Opportunity	Opportunities associated with contact	Opportunity List Applet - Basic	No
Organization Analysis	Illustrates organization hierarchy	Contact Organization Analysis Applet	No
Profile	Personal profile of contact	Contact Profile Applet; Contact Activity Applet	No

